Will Planner Instructions
Confidential

Personal details

Self (or Client 1)

Date of will instruction ___ / ___ / ___ (Day/Month/Year)

Surname | Given name/s

Name known by | Date of birth / / (Day/Month/Year) | Place of birth

Residential address

Postcode

Postal address – if different to above

Postcode

Occupation | Home telephone no. ( ) | Business telephone no. ( )

Mobile telephone no. ( ) | Email address

Present marital/De facto status

Have you been previously married?

☐ Yes – include any children below ☐ No

Spouse/De facto (or Client 2)

Surname | Given name/s

Name known by | Date of birth / / (Day/Month/Year) | Place of birth

Occupation | Business telephone no. ( )

Have you been previously married?

☐ Yes – include any children below ☐ No

Children details (If of a previous marriage/relationship please indicate)

Surname	Given name/s	Date of birth	Parent (Client 1 or 2)
		/ /	
		/ /	
		/ /	
		/ /	
		/ /	
		/ /	
		/ /	

Executor details

When making this appointment please give careful consideration to the duties involved as they may be onerous and time consuming.
I wish to appoint National Australia Trustees in one of the following capacities: (Please tick one box only)

☐ National Australia Trustees Limited – solely.

☐ National Australia Trustees Limited as co-executor with someone else.

☐ National Australia Trustees Limited as alternate executor in case someone else is not available.

or

☐ I do not wish to appoint National Australia Trustees Limited.

If you do not wish to appoint National Australia Trustees Limited as your sole executor would you please include the details of your nominated executor(s) below:

Full name | Relationship | Sole/Co-Executor/Substitute

Address | Postcode

Executor details (cont.)

Full name | Relationship | Sole/Co-Executor/Substitute

Address | Postcode

Full name | Relationship | Sole/Co-Executor/Substitute

Address | Postcode

Trustee details

Same as Executor? ☐ Yes ☐ No

Full name | Relationship

Address | Postcode

Full name | Relationship

Address | Postcode

Is the primary beneficiary to be the trustee of his or own trust? ☐ Yes ☐ No

Details of Substantial Assets and Liabilities

Type of asset Any House or Real Estate (Address)	Joint/Sole names	Approximate value $	Location of Title, Deed

Bank Accounts, Fixed Deposits etc Company/Society branch

Other investments, eg shares, debentures, bonds, unit trusts etc

Life Insurance (outside superannuation)			Who is the life insured?

Superannuation, Company/Fund or Employer (including life insurance held within superannuation)

*** If you have a Self Managed Superannuation Fund, please forward a copy of the Trust Deed.**

*** If you have executed a binding death nomination please indicate and provide details (including date of execution).**

			Who is the nominated beneficiary?

If there is insufficient space in any section(s) please provide and attach additional details on a separate sheet of paper.

Details of Substantial Assets and Liabilities (cont.)

Type of asset

Interest in Private Companies, Family Trusts, Partnerships, etc.

Please forward a copy of the Company Constitution, Trust Deed, Partnership Agreement, etc.	Owner names	Approximate value $	Location of Deed, Agreement etc

Other substantial assets. eg. antiques, art, bullion, stamps etc.

Details of substantial liabilities

Distribution details

(a) Specific bequests, devises or legacies (free of all duties and charges).

If it is intended to make any specific gift of money, real estate, jewelry, etc, please show below a full description of the intended gift **as well as** the full name and the relationship to you of the person to receive it. **Where specific bequests vary between Client 1 and Client 2, please highlight.**

☐ These gifts are to take effect on my death

OR

☐ Only in the event of my spouse/de facto predeceasing me

Details of specific bequests etc

(b) Trust details

(c) Balance of Estate

State to whom (after specific bequests) the residue of the estate is to be distributed.

Note:
1. It is advisable to have at least three levels of distribution based on survivorship, eg spouse, children, grandchildren, parents, brothers/sisters, nephew/nieces or charity etc.
2. If a husband/wife have assets such as matrimonial home, bank accounts etc in joint names and there are no children surviving them, consideration should be given to dividing the assets between their respective beneficiaries/next of kin.

1st Level – Full name (and date of birth if a minor)	Relationship	Proportion

If there is insufficient space in any section(s) please provide and attach additional details on a separate sheet of paper.

(c) Balance of Estate (cont.)

2nd Level – If the above predeceases me then my estate will be distributed to:

Full name	Relationship	Proportion

3rd Level – If all the above predecease me my estate will be distributed to:

Full name	Relationship	Proportion

Note: Distribution to a person who is a minor at deceased's date of death will be at age 18 unless an older age is specified.

Older age ☐

Beneficiary Exclusion

Are you excluding anyone from your Will who may expect to receive a benefit on your death? ☐ Yes ☐ No

If yes, please include their details:

Full name	Relationship

Full name	Relationship

Other Details

Are you, your partner or any of your beneficiaries (at the 1st, 2nd or 3rd levels) currently entitled to any form of means tested social security pension or allowance? ☐ Yes ☐ No

Do you have any specific directions with regard to any other matters such as:

Any beneficial or controlling interest in Family Trusts, Companies or Partnership etc? – provide details

Are there any other factors which may influence the distribution of your estate, such as:

Any binding financial agreement with a partner or child maintenance orders? – provide details

Note: Your Will shall also contain general powers to allow your executor(s) to carry out the following duties: To pay all debts, expenses, taxes and duties; to invest as required; to distribute the Estate in cash or kind; to sell if necessary; to apply any infant's share for his/her welfare; to manage any business or property.

Guardianship details

Only complete this section if you wish to nominate guardians for minor children

First and main appointed guardians

Guardian's name (if a couple specify both names here)	Relationship to Client 1	Relationship to Client 2 (Partner)

Address	Postcode

Special directions

Guardianship details (cont.)

Substitute Guardians (if applicable)

Guardian's name (if a couple specify both names here)	Relationship to Client 1	Relationship to Client 2 (Partner)

Address | Postcode

Special directions

Funeral details

Only complete this section if you wish to include funeral instructions. Where funeral instructions vary between Client 1 and Client 2, please highlight.

Organ Donor

☐ Research only ☐ Transplant/Therapeutic purposes ☐ Both

☐ Any part of body ☐ Eyes for corneal grafting ☐ Specified parts

Funeral arrangements

☐ Buried ☐ Cremated ☐ Statement barring cremation

Direction as to burial or scattering of ashes

Estate to pay costs of memorial plaque or headstone? ☐ Yes ☐ No

Further directions (eg Conducted in a simple manner)

Note: In Australia, it is advisable to register with the Australian Organ Donor Register.

Powers of Attorney & Guardianship

Powers of Attorney are separate documents to your Will. They may be important for you and your family during your life in case of an accident or other misfortune which results in your incapacity.

Appointment Details:

What type of Enduring Power of Attorney do you require?

☐ Financial ☐ Medical ☐ Guardianship

Note: Not all types are available in each State of Australia; our Officers can assist you here.

Full name | Relationship

Address | Postcode

Full name | Relationship

Address | Postcode

Full name | Relationship

Address | Postcode

Full name | Relationship

Address | Postcode

Powers/Limitations

If there is insufficient space in any section(s) please provide and attach additional details on a separate sheet of paper.

Powers of Attorney & Guardianship (cont.)

Multiple Appointments

If more than one person is named please indicate their basis for acting (joint, several or in substitution).

Note: In some States of Australia you do not have the ability to appoint a substitute attorney.

- ☐ Joint (your attorneys must act unanimously);
- ☐ Joint and Several (your attorneys can represent you together or independently of each other);
- ☐ by Majority (Queensland only) (where three or more attorneys are appointed, provided a majority of your attorneys agree with respect to any decision they may act);
- ☐ Substitute, where available. Where you wish one or more attorney to act only in substitution to one or more or all of your other appointed attorneys, in the event these first appointed attorneys cannot act. If so, please provide details below.
  Note: Where you have more than one attorney appointed to act at the same time you will also need to specify whether these attorneys are to act jointly or jointly and severally.

WA only: Please indicate when the appointment of your attorney/s is to take effect:

- ☐ Immediately (while you have capacity, but will continue in force should you lose capacity);
- ☐ Declaration by Guardianship & Administration Board (that you have lost capacity);

Other relevant details

This is not a Will

Client Declarations:

1. I/We confirm that these are my/our completed Will instructions.
2. I/We confirm that I/we am/are aware of, and agree to pay, National Australia Trustees Limited's current fees for preparing my/our Will and/or other documents in accordance with these instructions.
3. I/We declare that where I/we have provided personal information about an individual I/we have made the individual aware of that fact and that:
   - their personal information has been collected by National Australia Trustees Limited for the purposes of providing me with a Will, the subject of this Will Planner;
   - I/We may not be able to obtain a comprehensive Will, the subject of this Will Planner if that individual's personal information is not provided;
   - the individual can gain access to their personal information by contacting National Australia Trustees Limited by telephone on 1800 036 172 or in writing to GPO Box 247 Melbourne Victoria 3001.

Signature (Client 1) Date / /

Signature (Client 2) Date / /

Important Notes

1. National Australia Trustees Limited will normally prepare your Will within 10 business days of receiving your completed instructions and other requested information. Please note that your Will is not effective until after you have signed and dated the Will and had it properly witnessed.
2. All documents are prepared by solicitors employed by National Australia Trustees Limited in Melbourne. Charges are authorised pursuant to Section 20A of the Trustee Companies Act 1984 (Vic).

Your Personal Information and Privacy

The privacy of your personal information has always been important to us at the National Australia Bank Group ("Group"). The Group is the National Australia Bank Limited and its subsidiaries such as MLC Limited. It includes all our banking, financing, funds management, financial planning, superannuation, insurance, broking and e-commerce organisations.

This statement is an outline of certain matters relating to the collection and handling of your personal information by the Group. A further explanation of our privacy practices is set out in our Privacy Policy.

Collecting your personal information

The purposes for which your personal information is collected will depend on the organisation with which you deal. Personal information is collected by Group organisations offering:

- banking and finance products or services such as personal accounts, loans, credit cards, term deposits, internet banking, e-commerce, derivatives, leasing and related lifestyle products or services
- financial planning or broking services or investment products such as managed funds, investment services, superannuation funds, investment bonds, retirement savings accounts and related lifestyle products or services
- trustee or custodial services such as safe deposit boxes or custody of assets for managed funds or superannuation funds
- life insurance products or general insurance products which includes those offered in conjunction with other Group products or services.

If you are, or may be acquiring, or have acquired a product or service from a Group organisation, it will collect your personal information for the purposes of:

- providing you with the relevant product or service (including assessing your application and identifying you)
- managing and administering the product or service
- protecting against fraud where it is a banking and finance, or insurance, product or service.

Group organisations may also collect your personal information for the purpose of letting you know about products or services from across the Group that might better serve your financial, e-commerce and lifestyle needs or promotions or other opportunities in which you may be interested.

If a Group organisation does not obtain the information it seeks it may not be able to:

- process your request
- manage or administer your product or service
- tell you about other products or services from across the Group that might better serve your financial, e-commerce and lifestyle needs.

Using and disclosing your personal information

In line with modern business practices common to many financial institutions and to meet your specific needs (such as where you have a financial adviser) we may disclose your personal information to the organisations described below. Where your personal information is disclosed we will seek to ensure that the information is held, used or disclosed consistently with the National Privacy Principles in the Privacy Act 1988 (Commonwealth) and other applicable privacy laws and codes.

The relevant organisations are those:

- involved in providing, managing or administering your product or service such as third party suppliers, other Group organisations, and loyalty and affinity program partners, printers, posting services, call centres, lenders mortgage insurers and our advisers
- which are Group organisations who wish to tell you about their products or services that might better serve your financial, e-commerce and lifestyle needs or promotions or other opportunities, and their related service providers, except where you tell us not to
- who are your financial adviser and their service providers
- involved in maintaining, reviewing and developing our business systems, procedures and infrastructure including testing or upgrading our computer systems
- involved in a corporate re-organisation
- involved in a transfer of all or part of the assets or business of a Group organisation
- involved in the payments system including financial institutions, merchants and payment organisations
- involved in product planning and development
- which are your representatives including your legal advisers
- as required or authorised by law, for example, to government or regulatory bodies for purposes related to public health or safety, the prevention or detection of unlawful activities or to protect public revenue
- where you have given your consent.

In addition, for Group organisations offering:

- banking and finance products or services – other organisations to which personal information is usually disclosed are card producers, card schemes, credit and fraud reporting agencies, debt collection agencies, mortgage insurance companies, your guarantors, organisations involved in valuing, surveying, or registering a security property or which otherwise have an interest in such property, purchasers of debt portfolios, underwriters, re-insurers and other organisations involved in our normal business practices (such as securitisation)
- financial planning or broking services or investment products – other organisations to which personal information is usually disclosed are superannuation and managed funds organisations and their advisers
- organisations in which you invest and other organisations involved in our normal business practices (such as securitisation)
- trustee or custodial services – other organisations to which personal information is usually disclosed are superannuation and managed funds organisations and their advisers and other organisations involved in our normal business practices
- life insurance products or general insurance products – other organisations to which personal information is usually disclosed are medical professionals, medical facilities, health authorities, assessors, underwriters, reinsurers and fraud detection agencies and other organisations involved in our normal business practices.

Your personal information may also be used in connection with such purposes.

Because we operate throughout the world, some of these uses and disclosures may occur outside Australia.

Consent

It is our practice to seek your consent to use or disclose your personal information to tell you about other products or services from across the Group that might better serve your financial, e-commerce and lifestyle needs, or other promotions or opportunities in which you may be interested. This may be done after an initial marketing contact. We assume we have your consent to use service providers to assist us with this (such as a posting service or an advertising agency), unless you tell us otherwise (see 'Contacting Us', below).

Gaining access to your personal information

You can gain access to your personal information. This is subject to some exceptions allowed by law. We will give you reasons if we deny access.

Contact us to get a form requesting access (see 'Contacting Us' below). In some cases, we may be able to deal with your request over the telephone or over a counter.

Contacting Us

To obtain more information about how we manage your personal information, or if you would like a copy of our Privacy Policy or a form requesting access, please call 13 22 65.

Or check our websites www.national.com.au or www.mlc.com.au